

## Job Aid:

### How to Create a Master Blanket Purchase Order (MBPO) for an Awarded Bid - Single Vendor

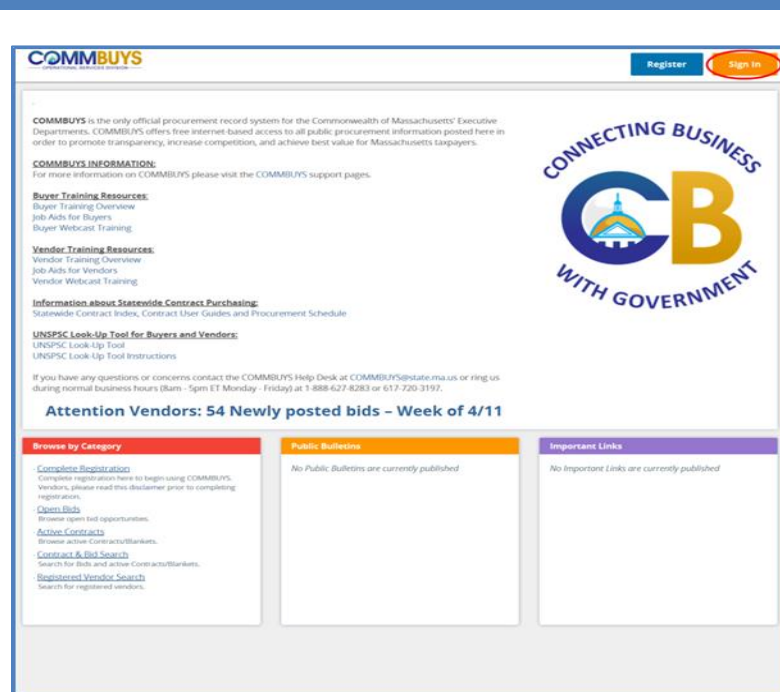
#### This Job Aid shows how to:

- Find and open an evaluated and awarded COMMBUYS Bid
- Create a Master Blanket Purchase Order (Contract) for an awarded Bid in COMMBUYS

#### Of Special Note:

Once the solicitation process is complete and the bid is awarded to a vendor(s), a MBPO for a new contract needs to be created in COMMBUYS. This job aid starts at the point where the bid has been awarded and approved. This job aid is for a single vendor MBPO. If you need to add more than one vendor to an MBPO, see the Job Aid called “How to Set up a Master Blanket from Scratch”.

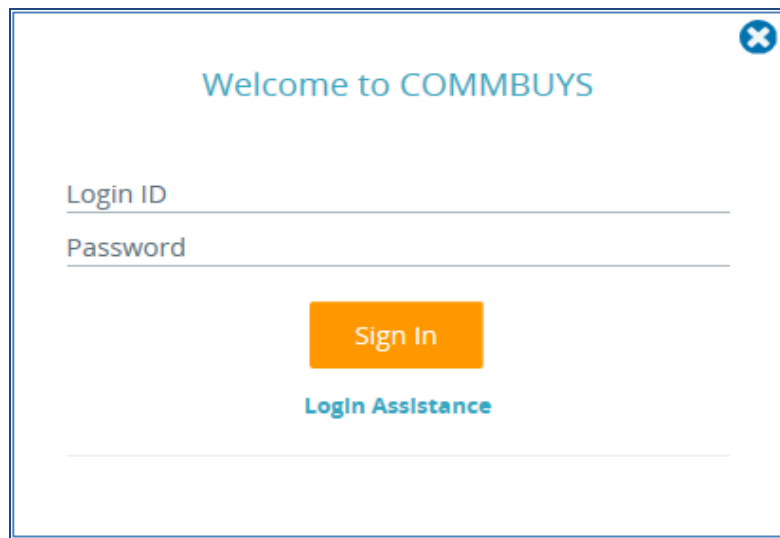
#### Screenshot



#### Directions

##### Step 1: Signing in to COMMBUYS

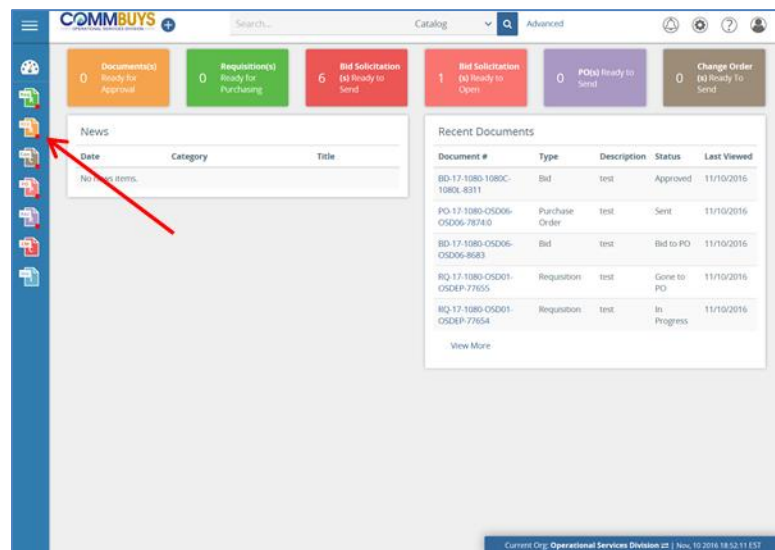
1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking on the hyperlink [COMMBUYS](#).
2. Click on the orange **Sign In** button in the upper right hand corner.
3. Enter your Login ID and Password and click on the **Sign In** button.



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#### Screenshot



#### Directions

##### Step 2: Searching for Bids

From the Main Menu, click on the **Bid Solicitations** (RFX) icon.

##### Step 3: Opening an Approved Bid

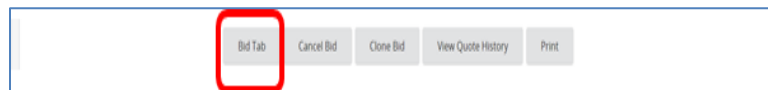
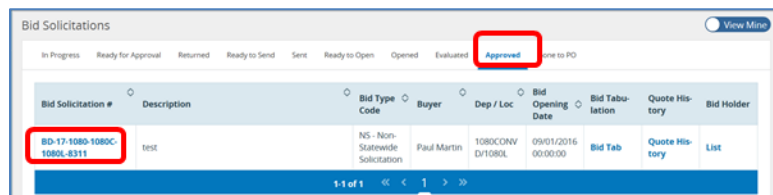
1. Click on the **Approved** tab.
2. Click on the blue hyperlink in the **Bid Solicitation #** column to open an approved Bid.

**NOTE:** Open Market bids can be changed to MBPOs; however, they are typically used for a one-time bid that will most likely not result in a contract.

##### Step 4: Clicking on the Bid Tab Button

The Bid opens to the **Summary** tab.

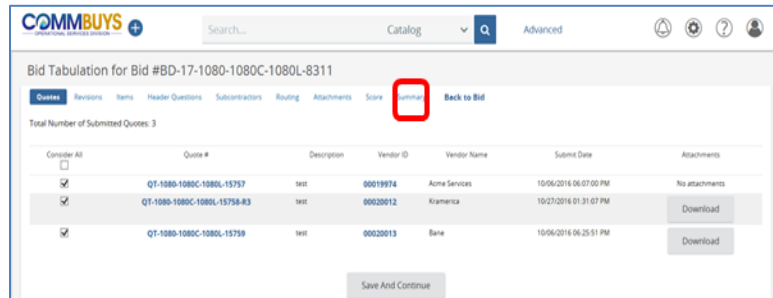
Scroll to the bottom of the page and click on the **Bid Tab** button.



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#### Screenshot



Consider All	Quote #	Description	Vendor ID	Vendor Name	Submit Date	Attachments
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15757	test	00019974	Acme Services	10/06/2016 06:07:00 PM	No attachments
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15758-43	test	00020012	Kramerica	10/27/2016 01:31:07 PM	<a href="#">Download</a>
<input checked="" type="checkbox"/>	QT-1080-1080C-1080L-15759	test	00020013	Bare	10/06/2016 06:25:51 PM	<a href="#">Download</a>

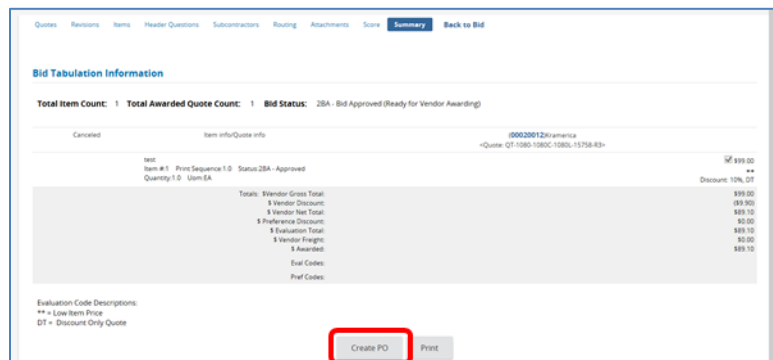
Save And Continue

#### Directions

##### Step 5: Accessing the Summary Tab

The **Bid Tabulation** page displays all the quotes received for the selected bid.

Click on the **Summary** tab.



**Bid Tabulation Information**

Total Item Count: 1 Total Awarded Quote Count: 1 Bid Status: 2BA - Bid Approved (Ready for Vendor Awarding)

Cancelled	Item Info/Quote Info	
	test	00020012Kramerica
	Item #1 Print Sequence 1.0 Status: 2BA - Approved	<Quote QT-1080-1080C-1080L-15758-43>
	Quantity 1.0 Unit EA	
	Totals:	
	\$ Vendor Gross Total	\$99.00
	\$ Vendor Discount	\$99.00
	\$ Vendor Net Total	\$0.00
	\$ Reference Discount	\$0.00
	\$ Evaluation Total	\$0.00
	\$ Vendor Freight	\$0.00
	\$ Awarded	\$0.00
	Eval Codes	
	Prof Codes	

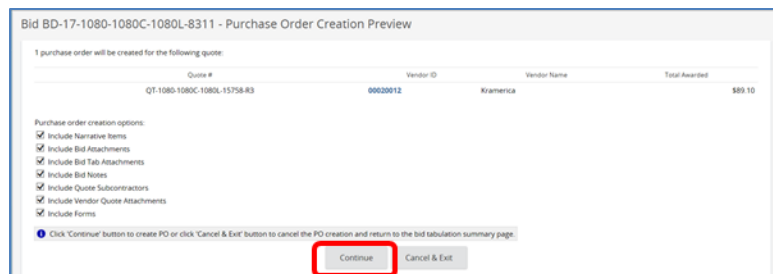
Evaluation Code Descriptions:  
 \*\* = Low Item Price  
 DT = Discount Only Quote

[Create PO](#) [Print](#)

##### Step 6: Clicking on the Create PO Button

The **Summary** tab for the bid opens. Scroll to the bottom of the page and click on the **Create PO** button.

**NOTE:** The Create PO button will only appear if the bid has been awarded.



Bid BD-17-1080-1080C-1080L-8311 - Purchase Order Creation Preview

1 purchase order will be created for the following quote:

Quote #	Vendor ID	Vendor Name	Total Awarded
QT-1080-1080C-1080L-15758-43	00020012	Kramerica	\$80.10

Purchase order creation options:

- ☒ Include Narrative Items
- ☒ Include Bid Attachments
- ☒ Include Bid Tab Attachments
- ☒ Include Bid Notes
- ☒ Include Quote Subcontractors
- ☒ Include Vendor Quote Attachments
- ☒ Include Forms

Click 'Continue' button to create PO or click 'Cancel & Exit' button to cancel the PO creation and return to the bid tabulation summary page.

[Continue](#) [Cancel & Exit](#)

##### Step 7: Previewing the PO Creation Page

The **Purchase Order Creation Preview** page displays with the purchase order creation options already preselected:

- Include Narrative Items
- Include Bid Attachments
- Include Bid Tab Attachments
- Include Bid Notes
- Include Quote Subcontractors
- Include Vendor Quote Attachments
- Include Forms

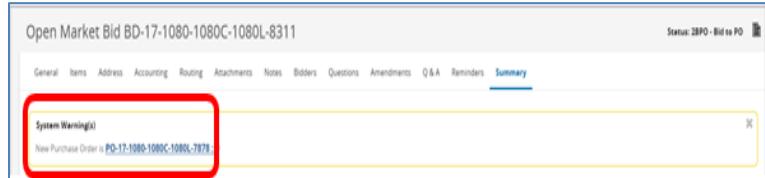
Keeping all the options checked will carry over from the bid to the Master Blanket.

Click on the **Continue** button to create the MBPO.

## Job Aid:

### How to Create a Master Blanket Purchase Order (MBPO) for an Awarded Bid - Single Vendor

#### Screenshot



Open Market Bid BD-17-1080-1080C-1080L-8311

Status: ZBPO - Bid to PO

General Items Address Accounting Routing Attachments Notes Bidders Questions Amendments Q&A Reminders Summary

**System Warning(s)**

New Purchase Order is [PO-17-1080-1080C-1080L-7878](#).

#### Directions

##### Step 8: Opening the PO

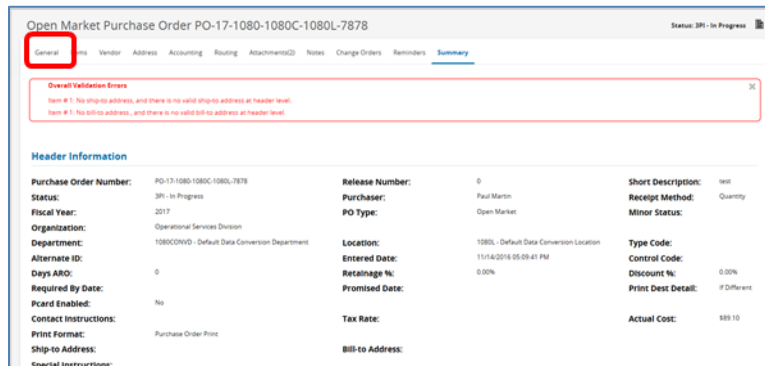
The page refreshes with the PO(s) created from the bid, one for each Vendor awarded.

You can open the PO by clicking on the blue hyperlinked **PO #** next to the words: "New Purchase Order is".

**NOTE:** A unique PO numbers is generated and is different from the Bid number.

##### Step 9: Selecting the General Tab

The PO opens to the **Summary** tab page. Click on the **General** tab.



Open Market Purchase Order PO-17-1080-1080C-1080L-7878

Status: ZBPO - In Progress

General Vendor Address Accounting Routing Attachments Notes Change Orders Reminders Summary

**Overall Validation Errors**

Item # 1: No ship-to address, and there is no valid ship-to address at header level.  
Item # 1: No bill-to address, and there is no valid bill-to address at header level.

**Header Information**

<b>Purchase Order Number:</b>	PO-17-1080-1080C-1080L-7878	<b>Release Number:</b>	0	<b>Short Description:</b>	test
<b>Status:</b>	ZBPO - In Progress	<b>Purchaser:</b>	Paul Martin	<b>Receipt Method:</b>	Quantity
<b>Fiscal Year:</b>	2017	<b>PO Type:</b>	Open Market	<b>Minor Status:</b>	
<b>Organization:</b>	Operational Services Division	<b>Location:</b>	1080L - Default Data Conversion Location	<b>Type Code:</b>	
<b>Department:</b>	1080CONVD - Default Data Conversion Department	<b>Entered Date:</b>	11/14/2016 05:09:41 PM	<b>Control Code:</b>	
<b>Alternate ID:</b>		<b>Retention %:</b>	0.00%	<b>Discount %:</b>	0.00%
<b>Days ARO:</b>	0	<b>Promised Date:</b>		<b>Print Dest Detail:</b>	If Different
<b>Required By Date:</b>		<b>Tax Rate:</b>		<b>Actual Cost:</b>	\$89.10
<b>Pcard Enabled:</b>	No	<b>Bill-to Address:</b>			
<b>Contact Instructions:</b>					
<b>Print Format:</b>	Purchase Order Print				
<b>Ship-to Address:</b>					
<b>Special Instructions:</b>					

##### Step 10: Reviewing/Editing the General Tab

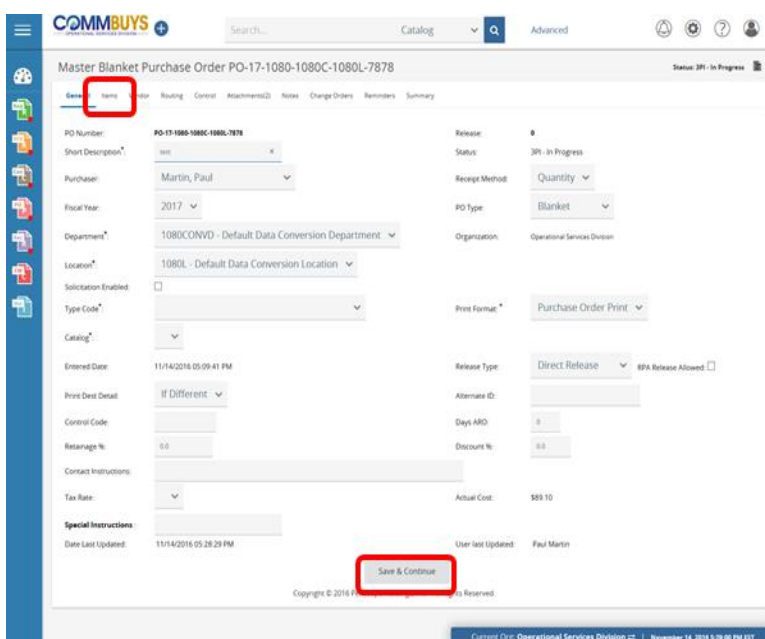
The 'In Progress' PO opens to the General Tab where any and all edits can be made.

All information from the bid was converted into the MBPO, however, if edits need to be made, click through each tab to make the appropriate changes.

**NOTE:** The Items tab will be the MBPO catalog. If a detailed and long item list is desired, you will need to reach out to OSD and the Helpdesk for assistance.

1. Review the **General** Tab. Some of the fields to review include:

- **Short Description:** a searchable field; your departmental numbering schema can be used.
- **Department:** defaults from the user's profile, but can be changed.
- **Location:** defaults from the user's profile, but can be changed.



Master Blanket Purchase Order PO-17-1080-1080C-1080L-7878

Status: ZBPO - In Progress

General Items Vendor Address Accounting Routing Attachments Notes Change Orders Reminders Summary

**PO Number:** PO-17-1080-1080C-1080L-7878

**Short Description:** test

**Purchaser:** Martin, Paul

**Fiscal Year:** 2017

**Department:** 1080CONVD - Default Data Conversion Department

**Location:** 1080L - Default Data Conversion Location

**Solicitation Enabled:** ☐

**Type Code:**

**Catalog:**

**Entered Date:** 11/14/2016 05:09:41 PM

**Print Dest Detail:** If Different

**Control Code:**

**Retention %:** 0.0

**Contact Instructions:**

**Tax Rate:**

**Special Instructions:**

**Date Last Updated:** 11/14/2016 05:28:29 PM

**Release:** 0

**Status:** ZBPO - In Progress

**Receipt Method:** Quantity

**PO Type:** Blanket

**Organization:** Operational Services Division

**Print Format:** Purchase Order Print

**Release Type:** Direct Release

**Alternate ID:**

**Days ARO:** 0

**Discount %:** 0.0

**Actual Cost:** \$89.10

**User last Updated:** Paul Martin

[Save & Continue](#)

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Current Org: Operational Services Division 22 | November 14, 2016 5:28:00 PM EST

## Job Aid:

### How to Create a Master Blanket Purchase Order (MBPO) for an Awarded Bid - Single Vendor

Screenshot	Directions
	<ul style="list-style-type: none"> <li> <b>Solicitation Enabled</b>            (checkbox): If the blanket will serve as a multi-vendor contract used for conducting bids to get pricing for specific orders, be sure to select this checkbox and instruct users to create solicitation enabled release requisitions when ordering from this contract.         </li> </ul> <p>In some cases, departments may choose not to check off "Solicitation Enabled" on a distributor blanket. One example of such a contract is a true distributor situation, where all the vendors are selling the same products at the same pricing.</p> <ul style="list-style-type: none"> <li> <b>Type Code:</b> <ul style="list-style-type: none"> <li>○ <b>CH</b> – Historical Contract</li> <li>○ <b>NC</b> - Non-Statewide/Limited User Contract</li> <li>○ <b>SW</b> – Statewide Contract</li> </ul> </li> <li> <b>Catalog:</b> Field is not used.         </li> <li> <b>Special Instructions:</b> Special instructions allow for the entry of specific instruction to vendors. When entered on the requisition, the data in this field will copy forward to the PO and also be visible on the print version of the PO. It can also be used to give a vendor specific instructions such as shipping or delivery or anything else. This field is available on the requisition and the PO.         </li> <li> <b>Print Format:</b> <ul style="list-style-type: none"> <li>○ <b>Purchase Order Print</b> (use this default)</li> <li>○ <b>PO Vendor Print</b></li> </ul> </li> <li> <b>Release Type:</b> <ul style="list-style-type: none"> <li>○ <b>Direct Release</b></li> <li>○ <b>Standard Release</b></li> <li>○ <b>RPA Only Release</b></li> <li>○</li> </ul> </li> </ul> <p><b>NOTE:</b> Multi-Vendor based blankets require "Standard Release".</p>

## Job Aid:

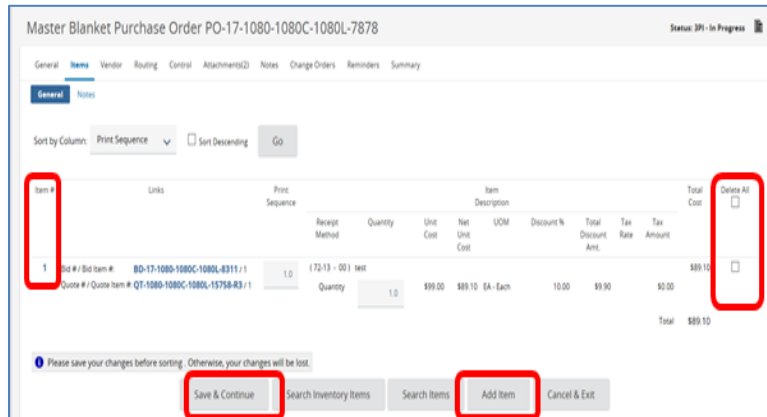
### How to Create a Master Blanket Purchase Order (MBPO) for an Awarded Bid - Single Vendor

Screenshot	Directions
	<ul style="list-style-type: none"><li>• <b>RPA Release Allowed (checkbox):</b><ul style="list-style-type: none"><li>○ If a Blanket is set up for either Direct or Standard Release, the RPA Release Allowed feature is optional and can be enabled for either of these release types. If enabled, it allows for Direct/Standard release orders to be processed off of the Blanket and also the ability to process RPA transactions.</li><li>○ If a Blanket is set up for RPA Only Release, the RPA Release Allowed is automatically selected and cannot be disabled. This ensures that no Direct/Standard release orders can be processed off of the Blanket and <u>only</u> RPA transactions are allowed.</li></ul></li></ul> <ol style="list-style-type: none"><li>1. When you have completed your edits, click on the <b>Save &amp; Continue</b> button.</li><li>2. Click on the <b>Items</b> tab.</li></ol>

## Job Aid:

### How to Create a Master Blanket Purchase Order (MBPO) for an Awarded Bid - Single Vendor

#### Screenshot



Master Blanket Purchase Order PO-17-1080-1080C-1080L-7878

Status: SPI - In Progress

General Items Vendor Routing Control Attachments(2) Notes Change Orders Reminders Summary

General Notes

Sort by Column: Print Sequence ☐ Sort Descending Go

Item #	Links	Print Sequence	Item Description	Receipt Method	Quantity	Unit Cost	Net Unit Cost	UOM	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Delete All
1	Bid # / Bid Item # BD-17-1080-1080C-1080L-4311 / 1 Quote # / Quote Item # QT-1080-1080C-1080L-15758-43 / 1	1.0	(172-13 - 00) test	Quantity	1.0	\$99.00	\$99.10	EA - Each	10.00	\$9.90	\$0.00	\$89.10		
Total													\$89.10	

Please save your changes before sorting. Otherwise, your changes will be lost.

Save & Continue Search Inventory Items Search Items Add Item Cancel & Exit

#### Directions

##### Step 11: Reviewing/Editing the Items Tab

The item information section is used to define goods or services, their United Nations Standard Products and Services Codes (UNSPSC), and pricing information.

Items added during the bid process will carry over and display. You have the option to:

- Leave the item as is
- Edit the item (click on the blue hyperlink in the **Item #** column)
- Delete the item (click on the checkbox in the **Delete** column, then click on the **Save & Continue** button)
- Add additional items (click on the **Add Item** button)

**NOTE:** A red error message displays when no items are present. All MBPOs require at least 1 orderable item.

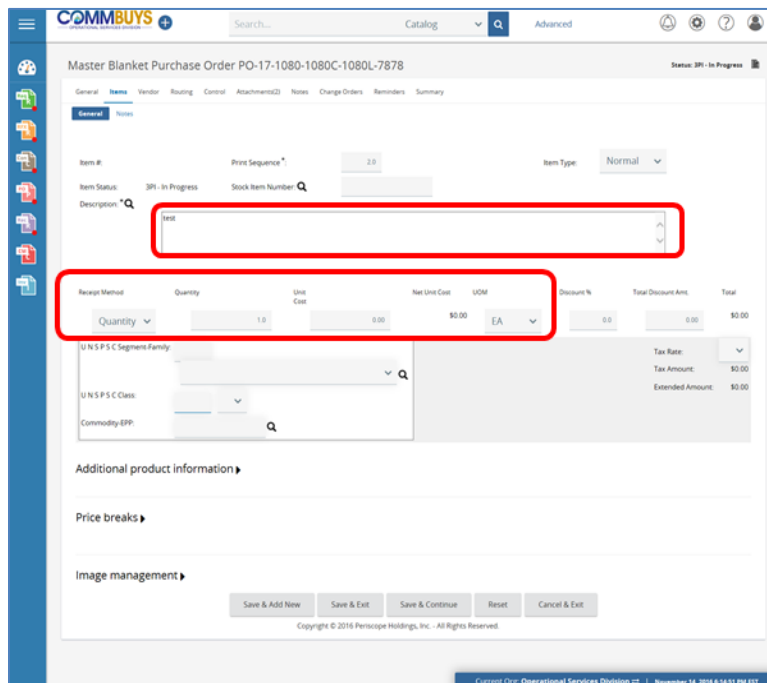
If you are adding an item, continue to the next step. If not, go to Step 16.

##### Step 12: Adding Item Detail

The **Add Item** button opens a new screen to enter item detail. Enter/Select the following:

- **Description:** good/service description
- **Receipt Method:** quantity or dollars; choose based on receiving needs for the blanket
- **Quantity:** (enter at least 1) make sure it is relevant to the receipt method
- **Unit Cost:** cost associated with the item/service per unit (can leave at 0 to allow the buyer to enter the information)
- **UOM (Unit of Measure):** choose from dropdown

**NOTE:** If pricing varies based on an item attribute, create separate items with distinct pricing. If you need users to be able to enter quoted prices, leave the price blank and instruct them to enter pricing and edit or add to the description on their release requisitions so that the vendor knows what buyers are ordering.



COMMbuys

Search... Catalog Advanced

Master Blanket Purchase Order PO-17-1080-1080C-1080L-7878

Status: SPI - In Progress

General Items Vendor Routing Control Attachments(2) Notes Change Orders Reminders Summary

General Notes

Item # Item Status SPI - In Progress Stock Item Number

Description \* test

Receipt Method Quantity Unit Cost Net Unit Cost UOM Discount % Total Discount Amt. Total

Quantity 1.0 0.00 \$0.00 EA 0.0 0.00 \$0.00

UNSPSC Segment Family

UNSPSC Class

Commodity EPP

Additional product information

Price breaks

Image management

Save & Add New Save & Exit Save & Continue Reset Cancel & Exit

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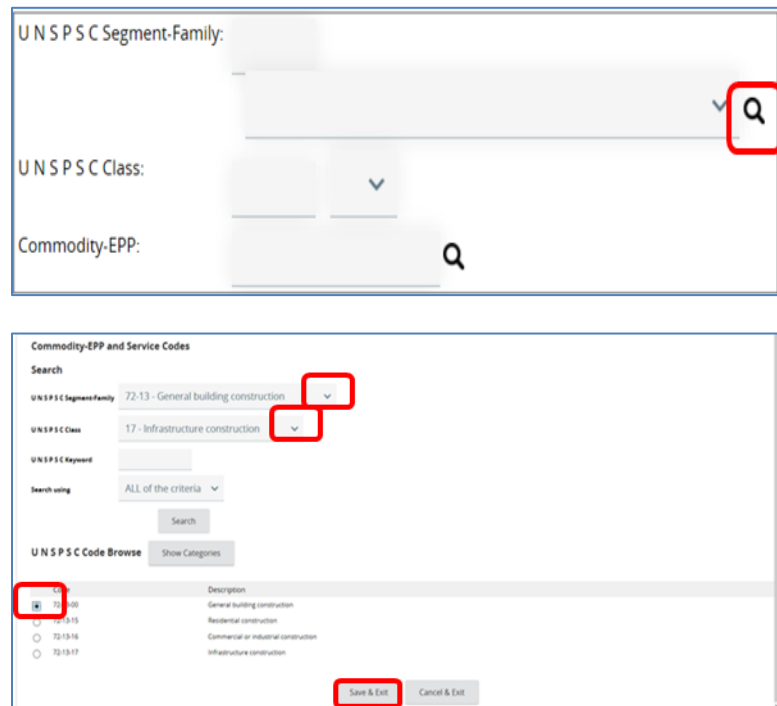
Current Org: Operational Services Division 27 November 14, 2016 6:14:51 PM EST



## Job Aid:

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#### Screenshot



#### Directions

##### Step 13: Opening the UNSPSC Search

1. Use the magnifying glass icon to open the popup UNSPSC search window.
2. Use the dropdown arrows to select the **UNSPSC Segment-Family** and **UNSPSC Class** fields, or enter a key word in the **UNSPSC Keyword** field.
3. Click on the **radio button** next to the desired code.

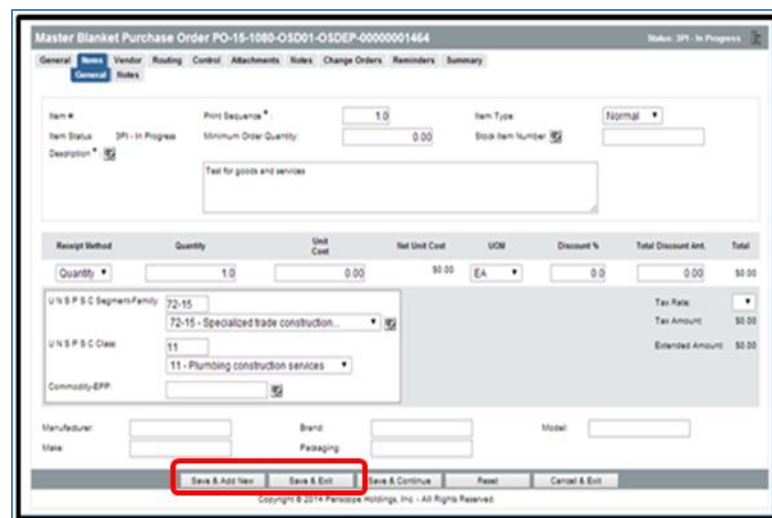
**NOTE:** Select the most applicable code for the item, as there may be multiple options.

4. Click on the **Save & Exit** button once you have selected the applicable code, and the Items screen will redisplay.

##### Step 14: Completing the Items Tab

When the item entry is complete, click on the **Save & Exit** button to complete the entry or the **Save & Add New** button to enter more line items for the contract.

If you want to select more UNSPSC codes for the MBPO, you can do so by creating multiple items and assigning a different UNSPSC code to each.

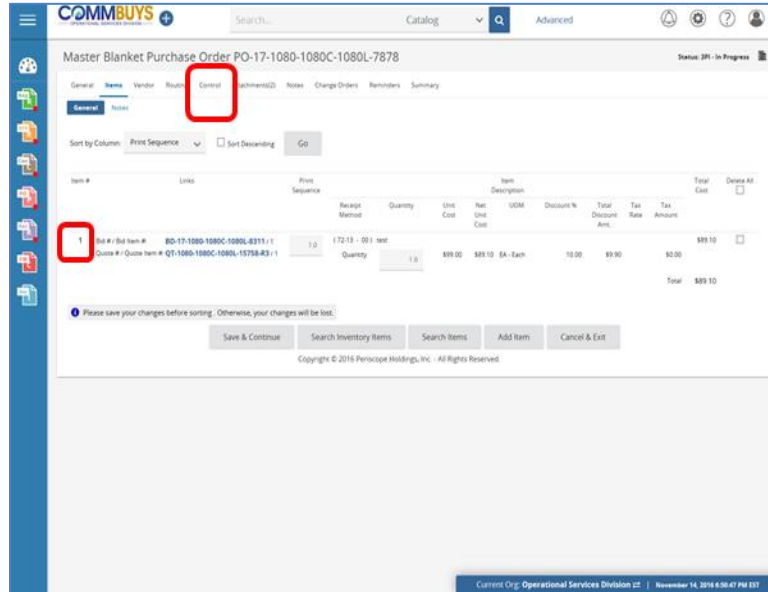




## Job Aid:

### How to Create a Master Blanket Purchase Order (MBPO) for an Awarded Bid - Single Vendor

#### Screenshot



Master Blanket Purchase Order PO-17-1080-1080C-1080L-7878

General Items Vendor Receipt Control Attachment(s) Notes Change Orders Reminders Summary

Sort by Columns Print Sequence ☐ Sort Descending Go

Item #	Links	Print Sequence	Receipt Method	Quantity	Unit Cost	Net Unit Cost	UOM	Description	Discount %	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Delete All
1	<a href="#">Bid # / Bid Item #</a> <a href="#">Quote # / Quote Item #</a>	172-13 - 001	net	1.0	\$89.00	\$89.10	EA	Each	10.00	\$9.90	\$0.00	\$0.00	\$89.10	
Total													\$89.10	

Please save your changes before sorting. Otherwise, your changes will be lost.

Save & Continue Search Inventory Items Search Items Add Item Cancel & Exit

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Current Org: Operational Services Division (2) | November 16, 2016 4:56:47 PM EST

#### Directions

##### Step 15: Reviewing the Items General Tab

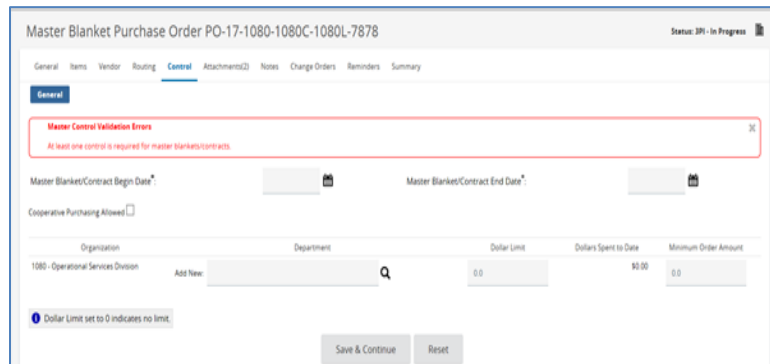
The Items General tab redisplay.

To edit an item you have already entered, click on the blue hyperlinked number in the **Item #** column on the left side of the screen.

## Job Aid:

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#### Screenshot



#### Directions

##### Step 16. Completing the Control Tab

1. Click on the **Control** tab.
2. At the top of the page, select the **Master Blanket/Contract Begin and End Date** using the calendar icon if not already done so on the bid.

The **Cooperative Purchasing Allowed** box should only be checked if multiple COMMBUYS organizations have access to view and use this MBPO.

New contracts created in COMMBUYS are divided into two groups:

- **Statewide / Designated Statewide**, which will be available for use to all eligible entities
- **Limited User / Departmental Contracts**, which will be available for use by one (i.e. the issuing Department) or more eligible entities (either listed specifically in the Request for Response (RFR) or defined generally in the RFR and then subject to authorization by the issuing Department)

Contract type:

- **Statewide** – Only check Cooperative Purchasing and Add “All Org” if authorized by OSD **AND** within the RFR language
- **Limited User Departmental Contract/Multiple Organizations** – Check the **Cooperative Purchasing Allowed** checkbox and add one or more organizations authorized to use the MBPO
- **Limited User Departmental Contract/Single Organization** – Do not check Purchasing; this defaults to your organization only

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#### Screenshot

#### Directions

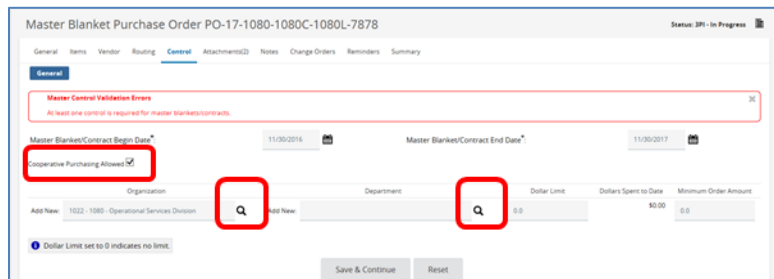
##### Step 17: Setting Cooperative Purchasing

If **Cooperative Purchasing Allowed** is checked:

1. Click on the magnifying glass icon next to the **Organization** field.
2. After clicking on the magnifying glass icon, a Lookup Organization popup screen displays. To select a cooperative purchasing organization (you can only select one organization at a time) check the radio button next to the desired organization.
3. Click on the **Select** button at the bottom of the page.
4. Repeat this process for the **Department** field.
5. Click on the **Save & Continue** button.

If **Cooperative Purchasing Allowed** is left unchecked:

1. Click on the magnifying glass icon next to the **Department** field.
2. On the popup screen, using the radio buttons, select the department(s) within your organization who will need to view and utilize this MBPO, then click on the **Select** button.
3. Click on the **Save & Continue** button.
4. Click on the **Summary** tab.



Master Blanket Purchase Order PO-17-1080-1080C-1080L-7878

General Items Vendor Routing **Control** Attachments(2) Notes Change Orders Reminders Summary

**Master Control Validation Errors**  
At least one control is required for master blanket contracts.

Master Blanket/Contract Begin Date\* 11/30/2016 Master Blanket/Contract End Date\* 11/30/2017

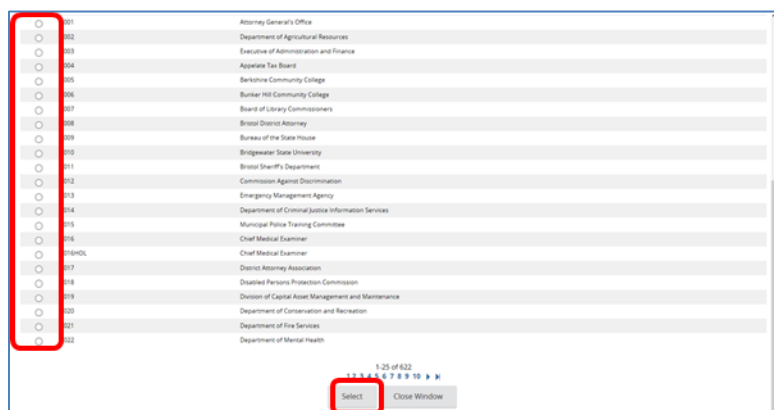
**Cooperative Purchasing Allowed** ☒

Organization  Department  Dollar Limit \$0.00 Dollars Spent to Date \$0.00 Minimum Order Amount \$0.00

Add New 1080 - Operational Services Division

Dollar Limit set to 0 indicates no limit.

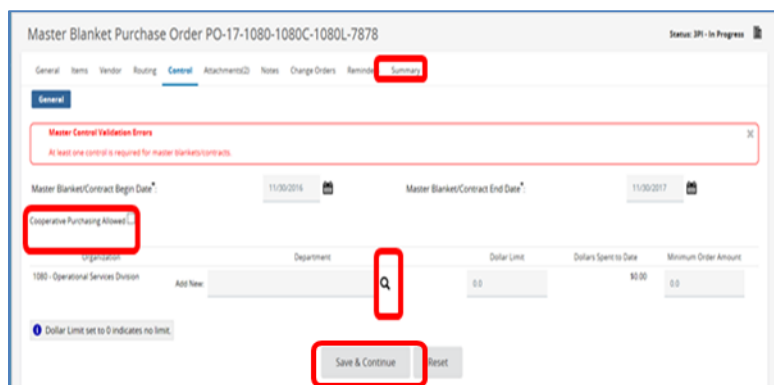
Save & Continue Reset



<input type="radio"/>	001	Attorney General's Office
<input type="radio"/>	002	Department of Agricultural Resources
<input type="radio"/>	003	Executive of Administration and Finance
<input type="radio"/>	004	Appellate Tax Board
<input type="radio"/>	005	Berkshire Community College
<input type="radio"/>	006	Berkshire Hill Community College
<input type="radio"/>	007	Board of Library Commissioners
<input type="radio"/>	008	Bristol District Attorney
<input type="radio"/>	009	Bureau of the State House
<input type="radio"/>	010	Bridgewater State University
<input type="radio"/>	011	Bristol Sheriff's Department
<input type="radio"/>	012	Commission Against Discrimination
<input type="radio"/>	013	Emergency Management Agency
<input type="radio"/>	014	Department of Criminal Justice Information Services
<input type="radio"/>	015	Municipal Police Training Committee
<input type="radio"/>	016	Chief Medical Examiner
<input type="radio"/>	017	Chief Medical Examiner
<input type="radio"/>	018	District Attorney Association
<input type="radio"/>	019	Disabled Persons Protection Commission
<input type="radio"/>	020	Division of Capital Asset Management and Maintenance
<input type="radio"/>	021	Department of Conservation and Recreation
<input type="radio"/>	022	Department of Fire Services
<input type="radio"/>	023	Department of Mental Health

1-20 of 122

Select Close Window



Master Blanket Purchase Order PO-17-1080-1080C-1080L-7878

General Items Vendor Routing **Control** Attachments(2) Notes Change Orders Reminders **Summary**

**Master Control Validation Errors**  
At least one control is required for master blanket contracts.

Master Blanket/Contract Begin Date\* 11/30/2016 Master Blanket/Contract End Date\* 11/30/2017

**Cooperative Purchasing Allowed** ☐

Organization 1080 - Operational Services Division Department  Dollar Limit \$0.00 Dollars Spent to Date \$0.00 Minimum Order Amount \$0.00

Add New

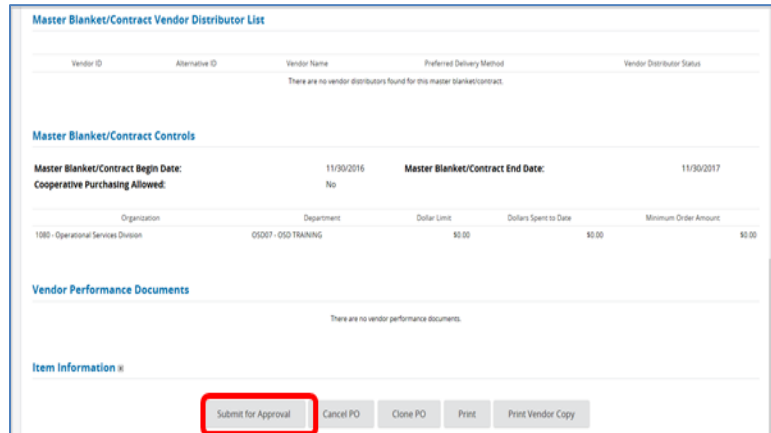
Dollar Limit set to 0 indicates no limit.

Save & Continue Reset

## Job Aid:

### How to Create a Master Blanket Purchase Order (MBPO) for an Awarded Bid - Single Vendor

#### Screenshot



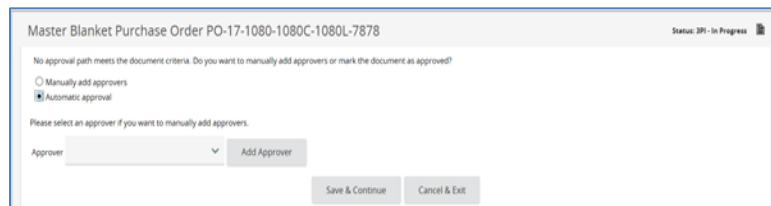
#### Directions

##### Step 18: Submitting for Approval

1. After clicking on the **Summary** tab, the PO is currently in an 'In Progress' status.
2. Scroll to the bottom of the page and click on the **Submit for Approval** button.

##### Step 19: Approving the MBPO

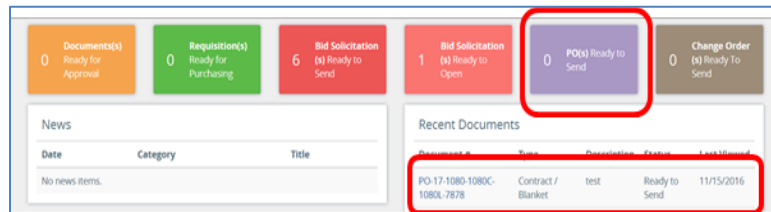
Your submittal request will go through your established approval process.



##### Step 20: Opening the PO

Once the PO has been approved, it is ready to be sent to the vendor(s).

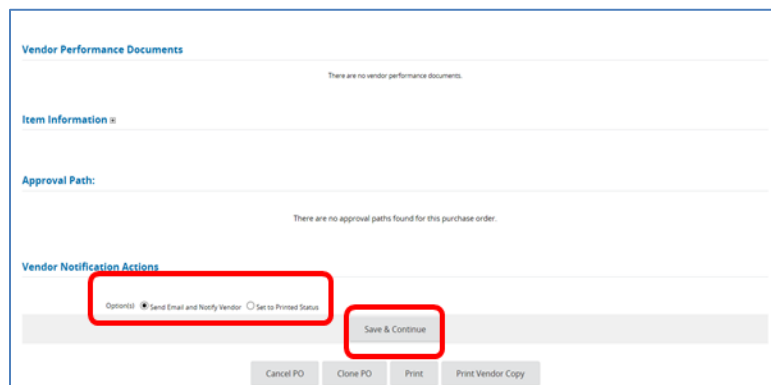
Click on the PO(s) **Ready to Send** box or click on the blue hyperlink for the purchase order # in the **Recent Documents** box to open the PO.



##### Step 21: Sending the PO

1. The PO opens to the Summary tab with a status of Ready to Send. Scroll to the bottom of the page.
2. Select one of the two options:
  - **Send Email and Notify Vendor:** sends vendor's COMMBUYS contact an email about the PO and the PO can be found in COMMBUYS
  - **Set to Printed Status:** no email is sent but the Vendor will be able to find and open the PO in COMMBUYS

Click on the **Save & Continue** button to put the MBPO in a 'Sent' status.





## **Job Aid:**

How to Create a Master Blanket Purchase Order (MBPO) for an Awarded Bid - Single Vendor